

# BGSU Schedule of Records Retention

## Office: Vice President for Student Affairs

In accordance with ORC Section 149.33 and Bowling Green State University Board of Trustees, a schedule of Retention and Destruction for the following records is hereby established. The records covered by this schedule, upon expiration of the retention period, shall be destroyed unless otherwise specified. No record shall be destroyed that pertains to any pending claim, action, litigation, or request.

Approvals:

Department Official: Signed

Date: 2/23/2007

Records Manager: Signed

Date: 2/26/2007

Schedule Number	Record Series Title	Retention Period
77-1	<b>Accounts Payable Records:</b> Amounts owed on open account for goods or services received	4 years, then destroy
77-2	<b>Accounts Receivable Records:</b> Amounts due from others on open accounts as a result of providing services	Retain 4 years, then destroy
77-3	<b>Annual Report</b> (of originating department)	Retain until of no administrative use, send 1 copy to Archives
77-4	<b>Budget Printout-Monthly:</b> Periodic reports of expenditures, usually by department or account	Retain 1 year, then destroy
77-5	<b>Budget Planning Documents:</b> Budget requests, including program plans for coming year, usually by cost center	Retain 1 year after budget prepared, then destroy
77-6	<b>Budget Transfers:</b> Billing between departments	Retain 1 fiscal year, then destroy
77-7	<b>Committee Records:</b> Includes agendas, minutes, correspondence, and reports for communities that are neither University-wide, nor Faculty Senate bodies	Retain until of no administrative use, then transfer to Archives

<b>Schedule Number</b>	<b>Record Series Title</b>	<b>Retention Period</b>
<b>77-8</b>	Correspondence, Executive: Deals with significant aspects of the administration of the office. Includes information on policy, program fiscal or personnel matters	Retain 2 years or until of no administrative use, then transfer to Archives
<b>77-9</b>	<b>Correspondence, General:</b> Includes internal letters and memos; correspondence from various individuals, companies, and organizations requesting information pertaining to agency and legal interpretations and other miscellaneous inquiries. This correspondence is informative but does not influence policy	Retain 1 year, then destroy
<b>77-10</b>	<b>Correspondence, Routine:</b> Referral letters, requests for routine information or publications provided to the public by an agency that are answered by standard form letters	Retain until of no administrative use, then destroy
<b>77-11</b>	<b>Discipline and Grievance Files:</b> Documentation of grievances and discipline proceedings concerning Classified and Administrative Staff; includes correspondence and letters of reprimand.	Retain 5 years after last action; destroy in a manner that protects confidentiality; same documentation in personnel file of employing unit and used and/or maintained by Equity, Diversity and Immigration Services and Human Resources Offices
<b>77-12</b>	<b>Drafts:</b> Preliminary outlines of a plan, procedure or report	Retain until superseded or issuance of final report, plan or policy, then destroy
<b>77-13</b>	<b>Handbooks, Student</b>	Retain until superseded, send 1 copy to the Archives
<b>77-14</b>	<b>Invoices:</b> Bills for goods shipped or services rendered	Retain 4 years, then destroy
<b>77-15</b>	<b>Lists/Directories:</b> Mailing lists, directories rosters and registers compiled by an office	Retain until superseded, obsolete, or replaced, then destroy
<b>77-16</b>	<b>Maintenance Contracts:</b> copies of contracts service histories and work orders	Retain active plus 6 years for current operating machines, then destroy
<b>77-17</b>	<b>Newsletters, brochures, publications</b> Printed documents about the office, programs and services. May include videos and DVDS.	Retain until of no administrative use, send 1 copy to the Archives

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77-18	<b>Personnel Files: Administrative and Classified Staff:</b> Files may contain position descriptions, applications, letters of appointment or change, salary rate, copies of annual contracts, performance evaluations, reclassification notices, letters of commendation or reprimand, evidence of continuing education, step increases, longevity,	Retain active (while person employed) plus 1 year; destroy in a manner protecting confidentiality. Human Resources retains official record
77-19	<b>Personnel Files-Students:</b> Student authorization forms, state and federal withholdings, PERS, pay/merit increases, exemptions, reclassifications	Retain active (while student employed) plus 6 years, then destroy in a manner protecting confidentiality.
77-20	<b>Policies and Procedures:</b> Documents created in drafting new policies and procedures	Retain until superseded or of no administrative use, then transfer to Archives
77-21	<b>Position Descriptions:</b> Descriptions of positions, whether administrative or classified, filed by the employing unit	Retain 1 year after superseded or position eliminated, then destroy
77-22	<b>Vice President-Subject Files</b> Correspondence, report, memos and other documents illustrating activities of the office	Retain until of no administrative use, then transfer to Archives
77-23	<b>Purchase Requisitions, Orders and Billing Records:</b> Records created to initiate the purchasing process, authorize and provide funds for or satisfy claims and expedite payments	Retain 4 years, then destroy
77-24	<b>Receipts</b>	Retain 4 years, then destroy
77-25	<b>Requisitions</b>	Retain 4 years, then destroy
77-26	<b>Search Committee Files:</b> May contain position authorization forms, job descriptions, minutes, credentials and cover letters, search chronology, authorization to hire forms and correspondence	Retain until of no administrative use, then destroy. Human Resources or Provost Office maintains official records
77-27	<b>Special Event/Conference Files:</b> Documents involved in the planning of the event or conference	Retain until of no administrative use, then destroy. Transfer copy of program and any official documents to Archives
77-28	<b>Student Disciplinary Files:</b> Documents involved in student disciplinary cases	Retain 3 years after date of last activity, then destroy in a manner which protects confidentiality. Official

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		records reside in Office of Student Life
<b>77-29</b>	<b>Telephone and Travel Expense Records</b>	Retain 1 year or until of no administrative use, then destroy
<b>77-30</b>	<b>Transient Documents</b> Documents that serve to convey information of temporary importance in lieu of oral communication	Retain until of no administrative value, then destroy